

SWIFT DATOO & COMPANY

LAW CORPORATION

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The information requested in this questionnaire is required in order to provide you with a Will which reflects your requirements. The questionnaire is broken into three sections. Please complete all sections.

PART I - PERSONAL

Date of completion: _____

Your name in full: _____

Occupation: _____

Address: _____

Telephone no. at home: _____ At work: _____

Domicile (where permanently resident): _____

Citizenship: _____

Date and place of birth: _____

Name at birth, if different from above: _____

Present marital status: _____

SPOUSE

Name of spouse in full: _____

Your domicile at time of marriage: _____

Date and place of birth: _____

Date and place of marriage: _____

Did you have a marriage contract?: _____

(Please attach a copy if one exists)

PREVIOUS MARRIAGES

Please give name(s) of previous spouse(s): _____

Date of separation: _____ Date of divorce: _____

(Please attach copies of separation agreements and court orders.)

YOUR CHILDREN

Please give full names and ages of all your children. Any special circumstances relating to infirmity, adoption, legitimacy, custody, etc. must be noted or discussed. If your children do not reside with you, please note their current addresses:

Full Name Date of Birth

PART II - ASSETS AND LIABILITIES

ASSETS

Real Estate:

Street address of residence: _____

Legal description: _____

Market value (approximate): \$ _____

Mortgage on property: \$ _____

Is mortgage life insured?: _____

Additional real estate held:

Street address: _____

Legal description: _____

Market value (approximate): \$ _____

Mortgage on property: \$ _____

Is mortgage life insured?: _____

Household goods and furnishings (approximate value): _____

Other personal property including jewellery, automobiles, boats, etc. (approximate value):

_____ \$ _____

_____ \$ _____

Bank accounts and term deposits including address of bank, number of accounts and names in which the accounts are registered:

_____ \$ _____

_____ \$ _____

RRSP/DPSP. Please note the name of trustee, registration number and beneficiary:

\$ _____

\$ _____

Mortgages/Agreements for Sale owing to you:

\$ _____

\$ _____

Other debts owing to you (family debts, notes, etc.):

\$ _____

\$ _____

Life insurance policies you hold. Please state company with which policy is held, number of the policy and beneficiary named in the policy:

\$ _____

\$ _____

Are you a recipient or potential recipient of a pension? Please give details:

\$ _____

\$ _____

Stocks and bonds (estimated total value of portfolio. Please give name of brokerage firm and account number as well as location of certificates.):

\$ _____

\$ _____

Interest you have in business (proprietorship/partnership/unincorporated/incorporated). Also please provide a copy of latest financial statements and any buy/sell agreements with respect to private company shares (consider necessity of buy/sell agreement):

\$ _____

\$ _____

Interest you have as a beneficiary in another estate, trust or power to appoint:

\$ _____

\$ _____

List any other substantial assets:

\$ _____

\$ _____

ESTIMATED GROSS VALUE OF ESTATE:

\$ _____

LIABILITIES:

Personal loans owing:

_____ \$ _____

_____ \$ _____

Guarantees:

_____ \$ _____

_____ \$ _____

Alimony/maintenance:

_____ \$ _____

_____ \$ _____

List any other substantial liabilities:

_____ \$ _____

_____ \$ _____

_____ \$ _____

ESTIMATED NET VALUE OF ESTATE: \$ _____

PART III - ORGANIZATION OF WILL

The following is a guide for the organization of the typical Will. Complete as much as you can or telephone us to arrange an interview.

GUARDIANS:

You should appoint a guardian for your children in case you and your spouse do not survive their minority (under age 19). Please give full names, addresses, occupations and relationship to you. Please name two guardians (either together or in the alternative) in case your first choice is unable to act as guardian.

EXECUTORS:

The executors step into the shoes of the deceased, gather in his/her assets, pay his/her debts and distribute the estate in accordance with the terms of the Will. Please give full names, addresses, occupations and relationship to you. Please name two executors (either together or in the alternative) in case your first choice is unable to act as executor. If your spouse is the sole beneficiary in the first instance, he/she should probably be sole executor.

DISTRIBUTION

Special Bequests:

Bequests of specific items and/or sums of money. Please give full names of each beneficiary, address, occupation and relationship to you. Please note that these specific items and/or sums of money will be given and paid to the beneficiaries before the bulk of the estate is distributed and will therefore reduce the amount passing to beneficiaries of the "residue".

Spouse Will:

Do you wish to leave all your estate to your spouse? If so, your spouse may be named as sole executor (and you will probably not make specific bequests as indicated above).

Yes: _____ No: _____

If your spouse does not survive you, to whom do you wish your estate to pass? Please complete the next portion of the questionnaire entitled "Non-Spouse Will". These clauses will only take effect if your spouse does not survive you.

Non-Spouse Will (for use either following spouse Will or instead of spouse Will):

The residue of your estate may pass to one or more beneficiaries. You also may wish your estate to pass to a first level of beneficiaries and in the event these beneficiaries do not survive you, to a second level of beneficiaries (e.g. first level: to my children equally; second level: if my children are not living at the date of my death, divide the estate between the following persons ...) Please give full names of each beneficiary, address and relationship to you.

First Level:

Second Level (if this level is unlikely, do not be complex):

If one of the above beneficiaries is not alive at the date of your death, do you wish his/her share to pass to his/her children **(yes / no)** or do you wish his/her share to be divided equally between the other living beneficiaries **(yes / no)**?

If a beneficiary is an infant (under the age of 19 years) at what age do you wish the estate to pass to him/her, **19 years** _____, **21 years** _____, or _____ **years**?

TRUSTEE POWERS:

Your executor is also the trustee of your estate and should be given direction regarding investment of the "trust fund" which makes up the residue of your estate.

Your trustee may be given powers additional to those allowed under the law. Some important powers are:

1. To invest:

Do you wish your trustee to be given restrictive investment powers **(yes / no)**, or be given broad powers of investment allowing your trustee to use his/her discretion in investing your "trust funds" **(yes / no)**.

2. To settle accounts and claims.
3. To use income and capital of infant beneficiary for his/her benefit, power to pay guardian or beneficiary directly or attaining the age of majority. (Infant means under age 19 in British Columbia.)
4. To grant leases on real estate.
5. To mortgage property to raise funds without selling.
6. To carry on or discontinue a business.
7. To buy additional shares, and/or participate in re-organization of your company.
8. To delegate trustee's functions to another party (e.g., a trust company).
9. To accept receipt of charitable institution for bequest.
10. To settle duties and death taxes.
11. To distribute in specie, i.e., distribute assets comprising "trust fund" without converting those assets to cash before distribution.

